



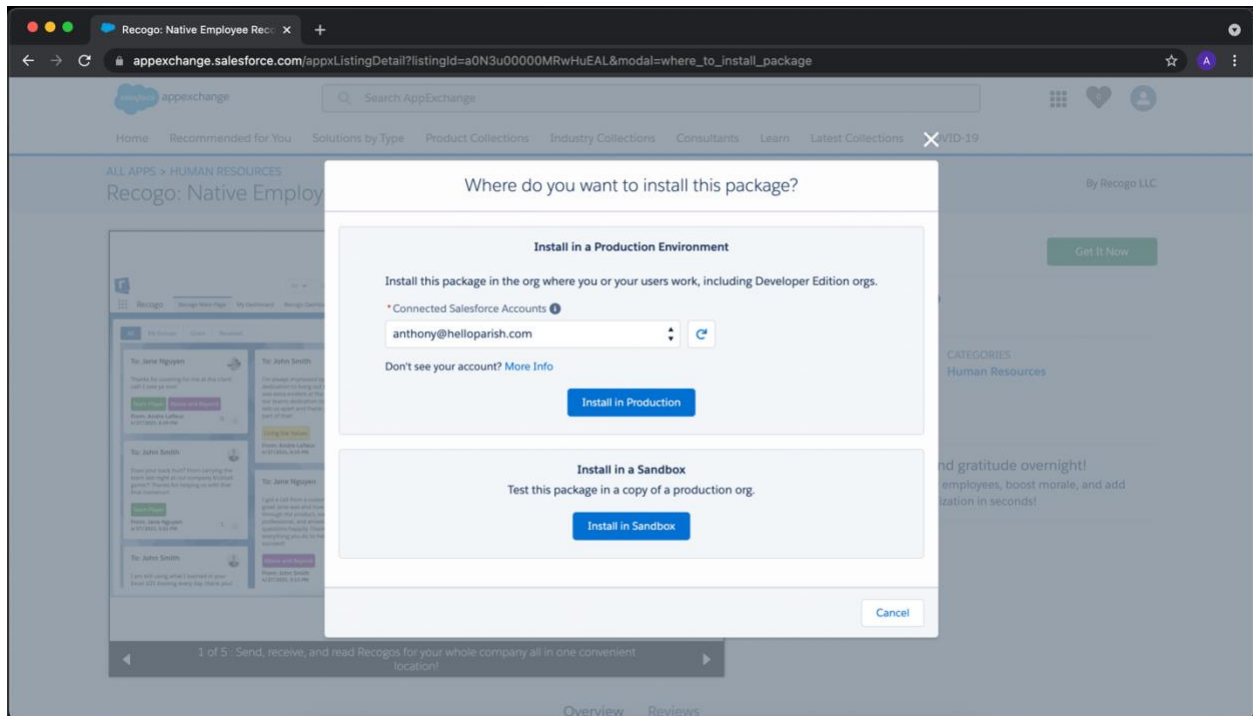
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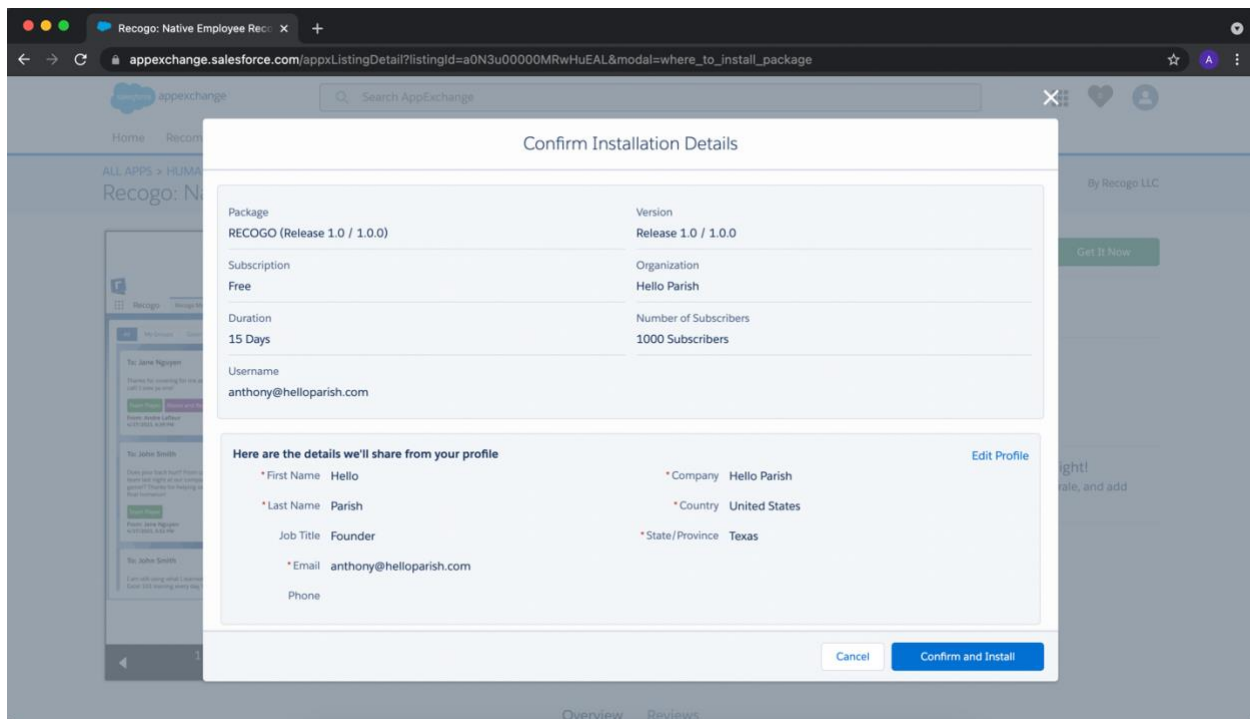
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Setting up Recogo

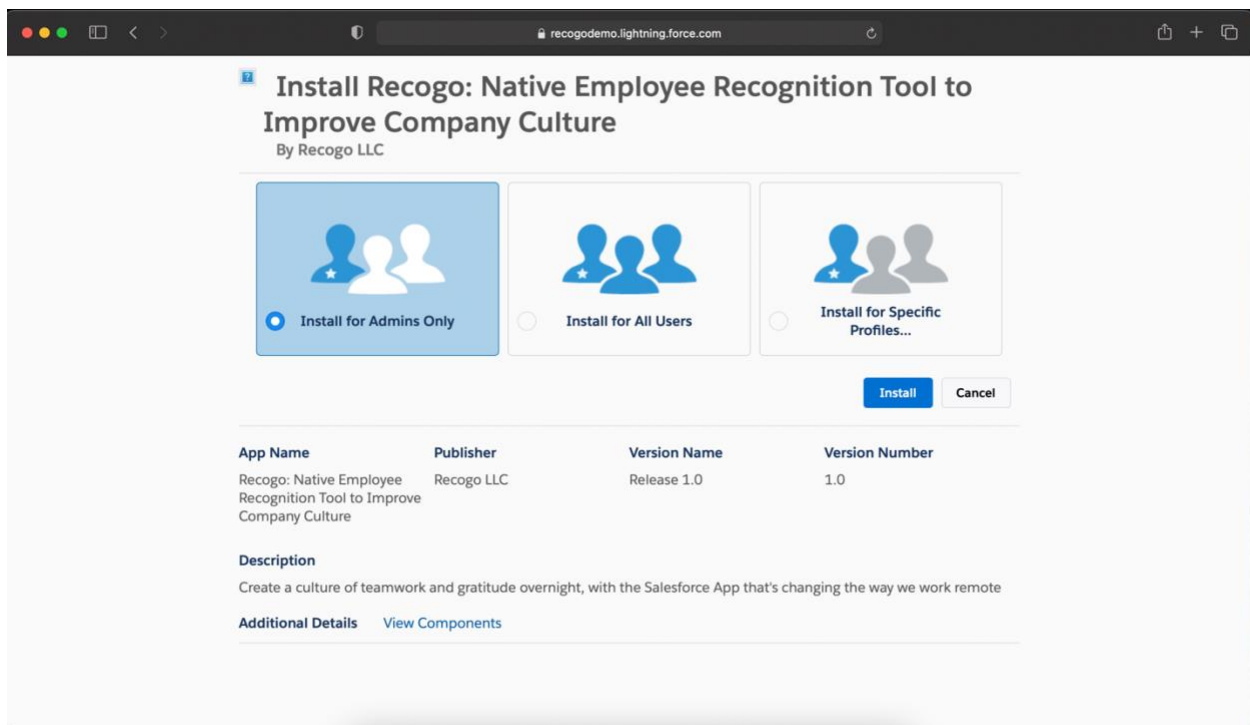
Step 1: Install the Package

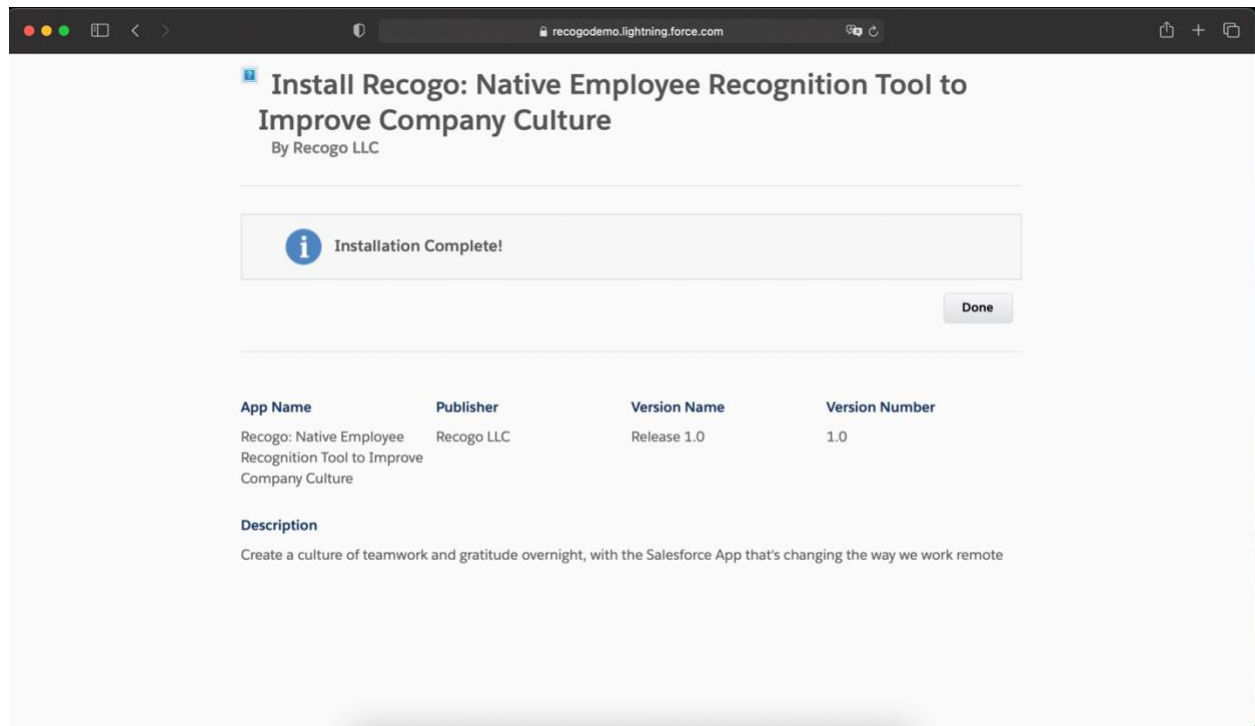
- 1) From the Salesforce AppExchange ([here](#)) click **Get It Now**
- 2) Select the environment you want to install Recogo in. We recommend your production org so you can get users sending Recogos as soon as possible.





- 3) After selecting to install in production of a sandbox click **Confirm and Install**
- 4) Select **Install for Admins Only**. This does not mean only admins will have access, rather if you decide to only give certain users access to Recogo it's easier to so if at install you limit to admins. Now click **Install**.





Congrats you have now installed Recogo!

Step 2: Assign Permission Sets

To give users access to Recogo you need to assign permission sets and licenses. Depending on the scope of users you want to give access to you can either assign individually, or in bulk.

Types of permission sets

There are three types of permission sets:

Recogo User: Every user of Recogo needs this permission set. It gives individuals access to the Recogo wall, to send/receive recogos and to see their reports on their recogos.

Recogo Admin: This is for the Recogo Admin, it allows them to add categories, adjust points and delete recogos.

Recogo Dashboard User: This is primarily for managers and admins. This permission set adds the Company Recogo tab that lets managers see reports for the whole company and not just an individual.

Individually assigning permission sets

Go to **Setup** -> **Users**. Then select the user you would like to give permission to.

Next scroll down to the list called **Permission Set Assignments**. Click **Edit Assignments**.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, Manage Subscription, ADMINISTRATION, Users (expanded), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays user details for 'John Smith', including 'Used File Space' (1.4 MB), 'Last Login' (7/10/2021, 10:41 AM), 'Last Password Change or Reset' (6/28/2021, 7:20 AM), 'Failed Login Attempts' (0), and 'Created By' (John Smith, 6/22/2021, 2:39 PM). Below the user details, there are four sections for 'Permission Set Assignments': 'Permission Set Assignments' (with a table showing 'Sales User' assigned on 6/22/2021), 'Permission Set Assignments: Activation Required' (no records), 'Permission Set Group Assignments' (no records), and 'Permission Set License Assignments' (table showing 'Sales User' assigned on 6/22/2021).

Select the permission set(s) you would like to give the user, click the right arrow to add it to the enabled permission sets box and click **Save**

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar is the same as the previous screenshot. The main content area displays the 'Permission Set Assignments' for 'John Smith'. It shows a 'Save' button and a 'Cancel' button. Below, there are two boxes: 'Available Permission Sets' and 'Enabled Permission Sets'. The 'Available Permission Sets' box contains a list of permission sets: CRM User, Einstein Case Classification User, Einstein Case Wrap-Up User, Recogo Admin, Recogo Dashboard User, Recogo User, Salesforce CMS Integration Admin, Salesforce Console User, Standard Einstein Activity Capture, and Trust Card Manager. The 'Enabled Permission Sets' box is currently empty. There are 'Add' and 'Remove' buttons between the two boxes. At the bottom, there are 'Save' and 'Cancel' buttons.

Assigning permission sets in bulk

Please see Salesforce's documentation to learn about [bulk assigning permission sets](#).

Step 3: Assign Licenses

If you are in a production org, you will need to assign licenses to the users you want to have access to Recogo. If you are in a sandbox org, skip this step, in sandboxes all users have access to managed packages so long as they have the appropriate permission set.

In Setup, click Apps -> Packaging -> Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Dev" until you customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking the Deploy button.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall	GS Sales Reports Dashboards	Salesforce Success Programs	1.0	
Uninstall	 Guest User Access Report	Salesforce	3.13	guar
Uninstall Manage Licenses	 RECOGO	RecogoDev	1.0	RECOGO
Uninstall	Salesforce.com CRM Dashboards Description: Salesforce.com CRM Dashboards	salesforce.com	1.0	
Uninstall	 Home & Child Kanban	Salesforce	1.8	kanbanDev

Then next to RECOGO select **Manage Licenses**

Setup Package Manager

Package Details
RECOGO

Back to Previous Page

Package Name	RECOGO	Publisher	RecogoDev
Status	Trial	Allowed Licenses	1000
Expiration Date	7/24/2021	Used Licenses	2

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Licensed Users

Add Users Remove Multiple Users

Action	Full Name	Role	Active	Profile
Remove	Smith, John		☒	System Administrator
Remove	Sponsor, Exec		☐	End User

Click **Add Users**

Select the users you want to give licenses to or **Select ALL**. If you want to bulk add licenses checkout the Salesforce help topic to [mass assign licenses](#) through data loader

Setup Package Manager

Add Users
RECOGO

View: All Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Available Users

Select Shown Deselect Shown Deselect All Add All Users

Action	Full Name	Role	Active	Profile
☒	Sponsor, Exec		☐	End User

Selected Users

Action	Full Name
☒	Sponsor, Exec

Add Cancel

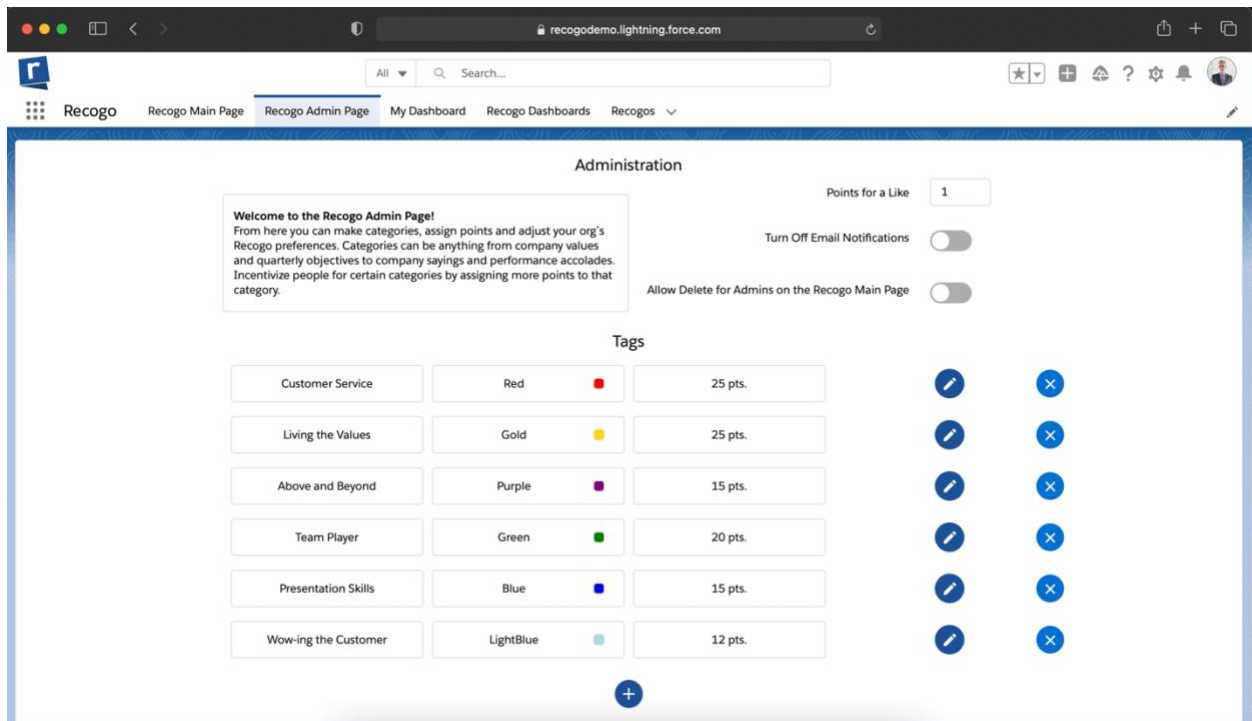
Then click **Add**

Customizing your Recogo App

Create Tags

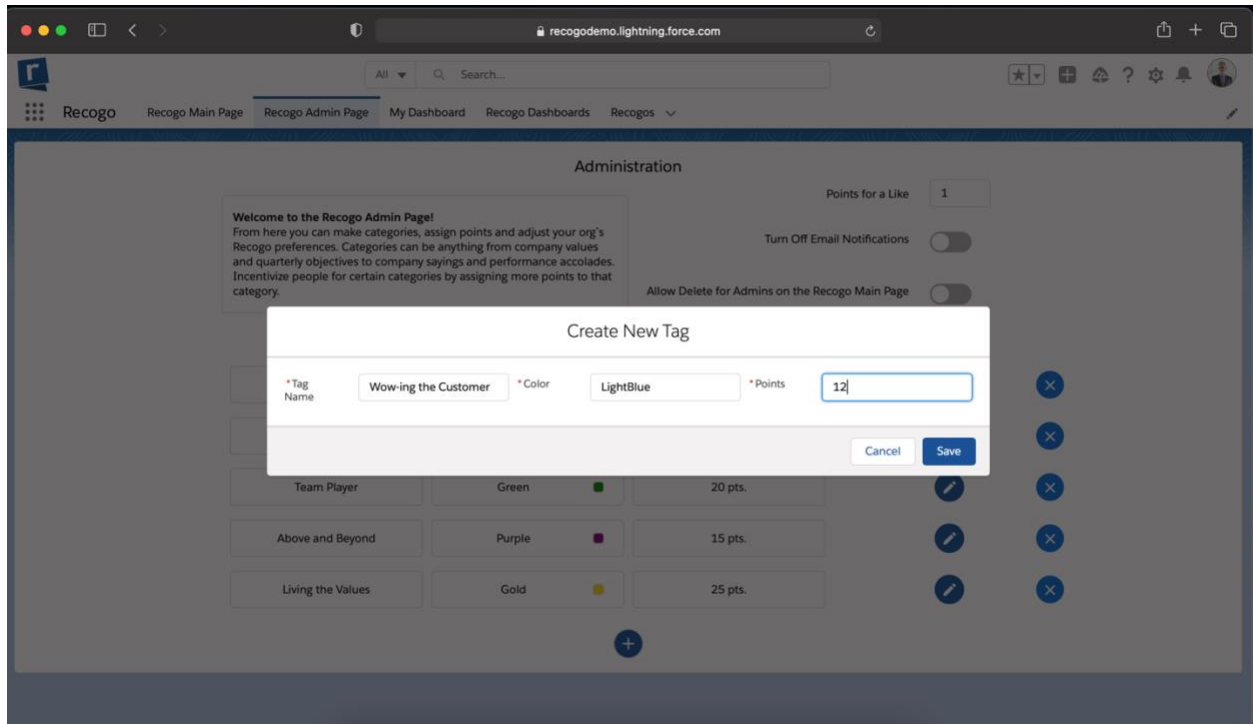
As a Recogo Admin (assigned from the Recogo Admin permission set) You have the ability to create tags, turn off email notifications and change points for likes.

In order to create tags go to the tab called **Recogo Admin Page**



Click the + button at the bottom to create a new tag, or the pencil icon next to a pre-existing tag to edit an existing tag

Fill out the tag information and click save



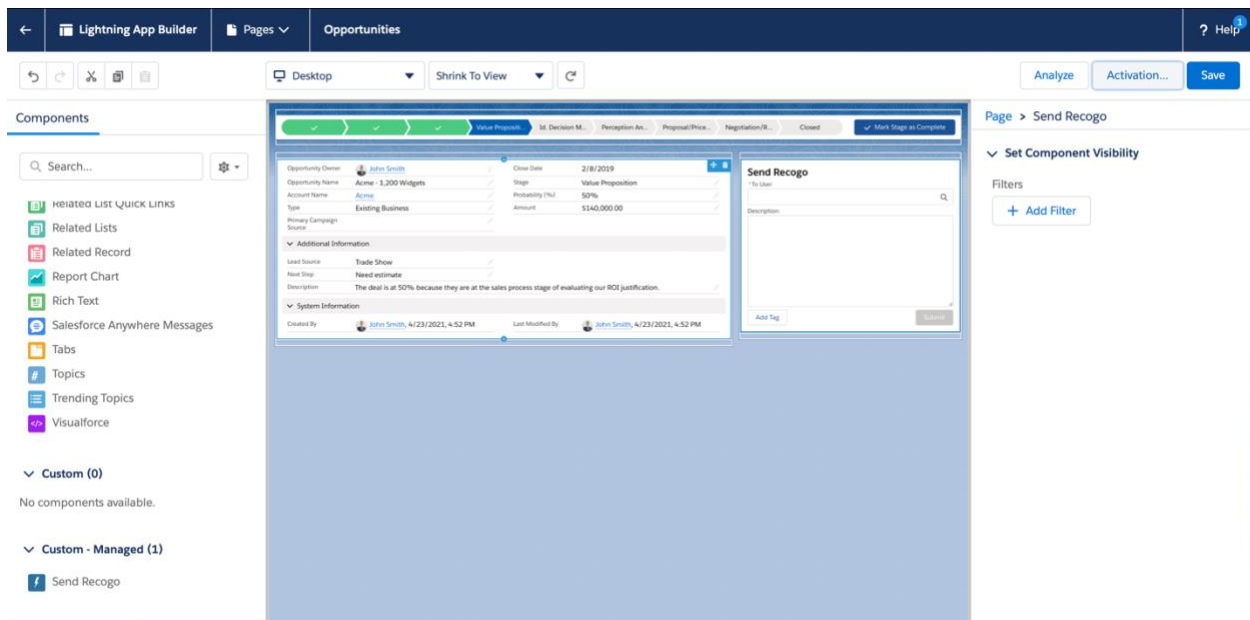
Once the users refresh their 'Recogo Main Page' they will be able to see the new tag

*Note you cannot use dashes in your tag name, for example: "Wow-ing customers" would cause an error on your main wall. Reach out to support if you need to be able to use dashes.

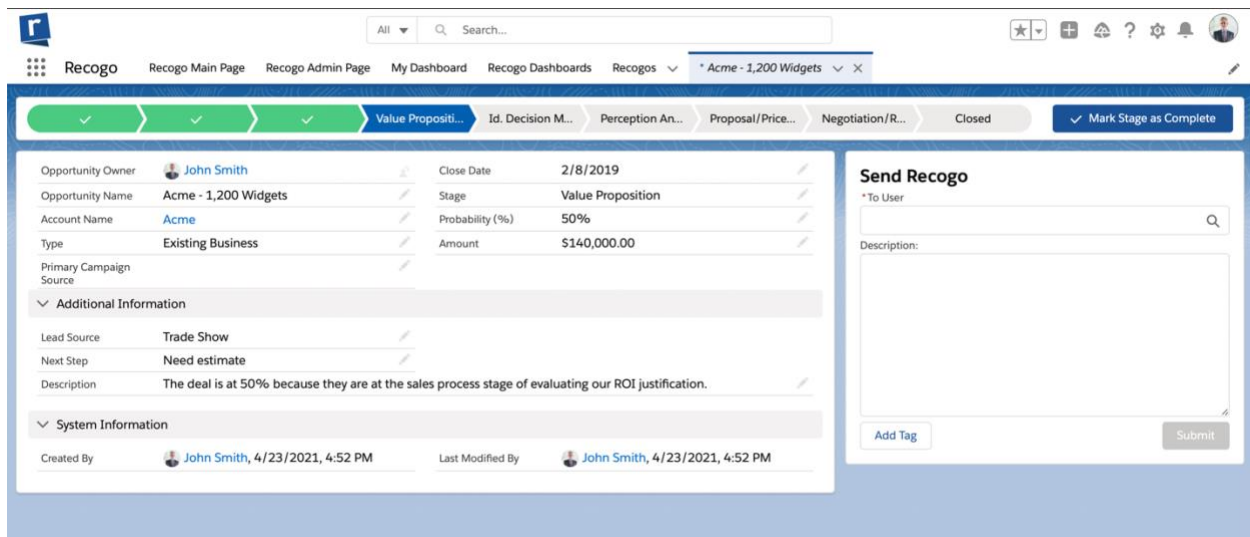
Put the 'Send a Recogo' component on a standard or custom page

While the 'Recogo Main Page' is a great place to send and receive recogos all from one place, let's say you want to help people send appreciation directly from the objects they are working with. For us, that's the opportunity object, however you can add the 'Send Recogo' component to any lightning page.

First go to a record for whatever object you would like the component on. On the top right of the page is a gear icon, click that and select **Edit Page**



Then select the **Send Recogo** component from the custom components page and drag it to the spot you'd like people to send Recogos from. Click **save** and voila, you can now send recogos without ever leaving the page!



Adding the 'Recogo Main Page' to your app

If you want it to be easier for users to access the 'Recogo Main Page', you can add the 'Recogo Main Page' tab to whatever App they use.

Go to Setup -> App Manager

Search Setup

Setup Home Object Manager

Lightning Experience App Manager

New Lightning App New Connected App

22 Items - Sorted by App Name - Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified...	App Type	Vis...
1	All Tabs	AllTabSet		4/23/2021, 4:54 P...	Classic	
2	App Launcher	AppLauncher	App Launcher tabs	4/23/2021, 4:53 PM	Classic	
3	Bolt Solutions	LightningBolt	Discover and manage business solutions designed ...	4/23/2021, 4:53 PM	Lightning	✓
4	Chatter Desktop	Chatter_Desktop	Chatter Desktop is an Adobe AIR-based desktop a...	4/27/2021, 4:44 PM	Connected (Managed)	
5	Chatter Mobile for BlackBer...	Chatter_for_BlackBerry	The Salesforce.com Chatter Mobile app lets you ac...	4/27/2021, 4:45 PM	Connected (Managed)	
6	Community	Community	Salesforce CRM Communities	4/23/2021, 4:52 PM	Classic	✓
7	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Exp...	4/23/2021, 4:52 PM	Lightning	✓
8	Marketing	Marketing	Best-in-class on-demand marketing automation	4/23/2021, 4:52 PM	Classic	✓
9	Platform	Platform	The fundamental Lightning Platform	4/23/2021, 4:52 PM	Classic	
10	Recogo	Recogo		4/27/2021, 2:54 PM	Classic (Managed)	
11	Recogo	Recogo_Lightning	Send and receive recognition with your coworkers!	4/27/2021, 2:54 PM	Lightning (Managed)	✓
12	Sales	Sales	The world's most popular sales force automation (S...	4/23/2021, 4:52 PM	Classic	
13	Sales	LightningSales	Manage your sales process with accounts, leads, o...	4/23/2021, 5:03 PM	Lightning	✓
14	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including pr...	4/23/2021, 4:52 PM	Classic	✓
15	Salesforce Chatter	Salesforce1_for_Windows	Salesforce Chatter gives Windows 10 users an inst...	4/27/2021, 4:45 PM	Connected (Managed)	
16	Salesforce CMS	SalesforceCMS	Manage content and media for all of your sites.	4/23/2021, 4:52 PM	Lightning	✓

Then on the far right of the app you'd like to add the tab to click the little triangle and select **Edit**

Lightning App Builder App Settings Pages Sales

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

- Quip Documents from List View
- Recogo Admin Page
- Recogo Admin Page Classic
- Recogo Dashboards
- Recogo Dashboards
- Recogo Main Page
- Recogo Main Page Classic
- Recogos
- Recommendations
- Recycle Bin

Selected Items

- Home
- Opportunities
- Leads
- Tasks
- Files
- Accounts
- Contacts
- Campaigns
- Dashboards
- Reports
- Chatter
- Groups

Then on the far-left underneath App Settings, Click on **Navigation Items**

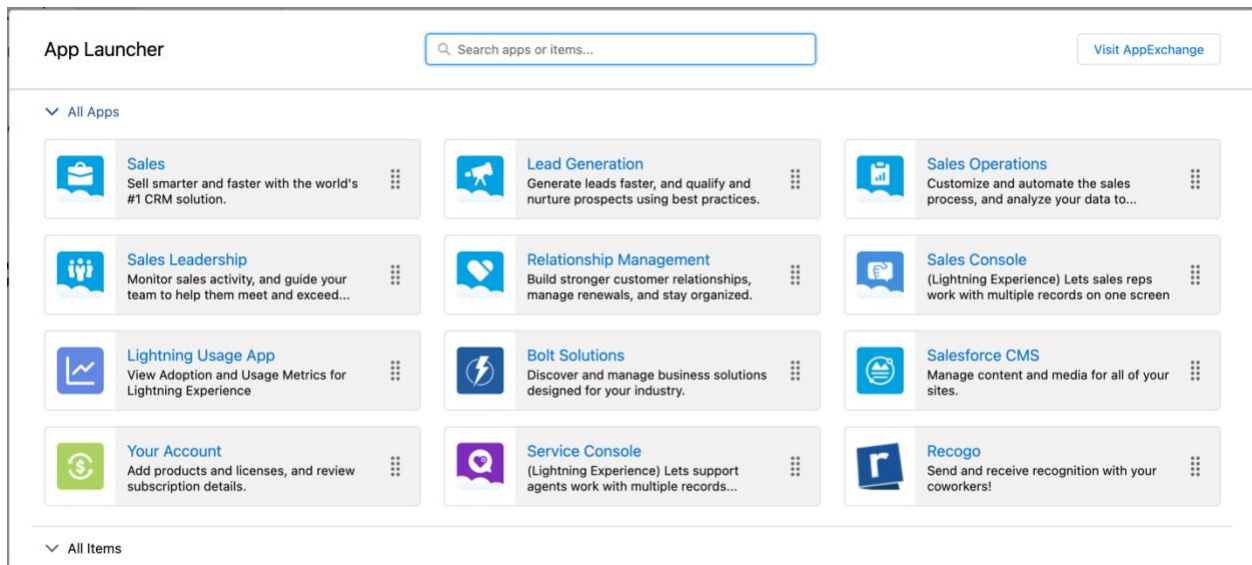
Then select **Recogo Main Page** and click the arrow pointing to the right to add it to the tab

Click Save and you're all set!

How-To:

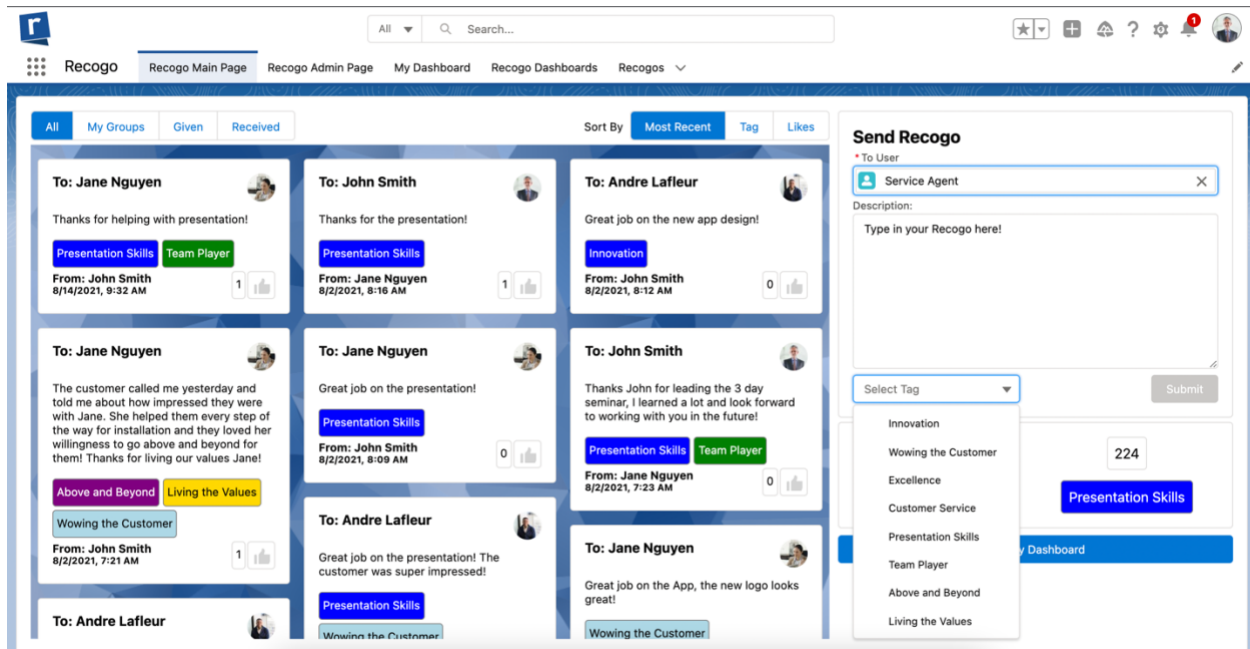
Access Recogo

After following the above installation steps users should be able to access Recogo by selecting it from their app launcher on the top left of their menu bar in Salesforce



Send your First Recogo

Sending a Recogo has never been easier! From the Recogo App (or if you added the 'Recogo Main Page' tab somewhere else, then from there).



In the 'Send Recogo' component, click in the text box under "To User". If your user does not show up as you are typing that user may not have a Recogo License, go to the [Assign License](#) portion of this document to make sure that user is able to receive recogos

Then type in the description box what you'd like your recogo text to say.

Finally, you can add tags to give the user recognition for preset tags developed by your admin. To add more tags, consult the [Create Tags](#) portion of this document.

Then click **send** and voila, the user will get a message letting them know that they received a Recogo!

Further Help

If you are having any other issues or need help customizing your app reach out to Support@Recogo.app and we will help you in any way we can!